

Amendment to Schedules, Matrices and Plans

Amendments can be difficult to file correctly primarily because the procedure is not logical. The instructions below are for filing amended schedules, matrices, plans and documents.

Rules to Remember:

- Amended Schedules and Motions to Amend Schedules do not need to be filed separately. Schedules may be filed as an attachment to the Motion.
- All other Amendments and Motions to Amend **MUST** be filed as separate documents. You must create two separate PDF files to enter them correctly. (Certificates of Service may always be filed with the Motion.)
- Amended Motions are always linked to the **original motion**.
- Amended Responses/Objection are always linked to the **original motion**.

A. Amended Schedules/Matrix

First determine whether a motion is required to amend the schedules¹ or matrix². If it is required, follow the steps below:

1. Select **Bankruptcy** from the blue menu bar at the top of the page.
2. Select **Motion/Applications** from the list.
3. Enter the case number (yy-nnnnn format) and click **Next**.
4. Check to see that you are in the correct case and select from the open box the **Amend Schedules** event. (Select the Amend Schedules-even for the matrix, **Do not** use Amend document.) Click **Next**.
5. Select your client from the Select Party screen and click **Next**.
6. Browse and attach your Motion to Amend Schedules.

¹ If the Objection to Discharge Deadline has not passed, Schedule F may be filed without a motion. (All other amendments require a motion.)

² Include only the added or amended creditors on the amended matrix.

- a. At this point, you may attach your **Declaration Concerning Debtor's Schedules: Verified Statement or Unsworn Declaration**, and
- b. If necessary, you may also attach your **Declaration Re: Electronic Filing** (Official Form 7.) Click **Next** to continue.
- c. If you are amending the matrix, attach the amended matrix as a PDF document. Include **ONLY** the ADDED Creditors. The Clerks office will add the creditors to the database.

Click **Next** to continue.

7. A screen will appear asking "Are you Amending Schedule D E F or Matrix?" Please answer Yes or No using [y] or [n]. Amendments to Schedules D, E, F and the matrix, for anything other than an address change, require the payment of a Fee. Saying yes, will cause a popup box to appear at the end of your transaction requesting payment. Enter your answer and click **Next** to continue.
8. A related to screen will appear. You must **link** the Motion to Amend Schedules or if, no Motion is required, link the Amended Schedules to the original schedules or voluntary petition. The original schedules or petition can be found under either the **caseupld** or **misc** categories.
9. Select the appropriate event (click on the box) and click **Next** to continue.
10. Modify the docket text in the next screen. Click **Next** to continue.
11. Proofread your entry and click **Next** to complete your transaction.

B. Amended Plans and Motions to Amend Plan³

Remember, other than the amended schedules and the matrix, amendments must be filed as separate documents. Start by creating two separate PDF files, one for the Amended Plan and the other for the Motion to Amend the Plan. The Certificate of Service may be filed as part of the motion.

File the Amended Plan First:

1. Select **Bankruptcy** from the blue menu bar at the top of the page.

³ Other than Amended Schedules and an Amended Matrix.

2. Select the **Plan category**.
3. Enter the case number (yy-nnnnn format) and click **Next**.
4. Check to see that you are in the correct case and select from the open box the Amended Plan event. **Do not** use the Amend document from any other category. Click **Next** to continue.
5. Select your client from the Select Party screen and click **Next** to continue.
6. Browse and attach the Amended Plan. Click **Next** to continue.
7. You must **link** the Amended Plan to the original plan. The next screen will prompt you to *Select the appropriate event(s) to which your event relates:*

Select the appropriate event by clicking on the box and click **Next** to continue.
8. If necessary, modify the docket text in the next screen. Click **Next** to continue.
9. Proofread your entry and click **Next** to complete your transaction.

Next, File the Motion to Amend the Plan:

1. Return to the blue menu bar at the top, select **Bankruptcy**, then select **Motion/Applications** from the list. Enter the case number (yy-nnnnn format) and click **Next**.
2. Check to see that you are in the correct case. Select the Motion to Amend from the list. (It will appear as **Amend**.) Click **Next** to continue.
3. Select your client from the list and click **Next** to continue.
4. Browse and attach your Motion with the Certificate of Service. Click **Next** to continue.
5. A screen will appear *Refer to existing events?* **Check the box** and click **Next** to continue.
6. Select the **Plan** category and click **Next** to continue.
7. Previously filed plans will appear. **Check the box** on the amended plan just filed. This will link the Motion and Plan together. Click **Next** to continue.

8. If necessary, modify the docket text in the next screen. Click **Next** to continue.
9. Proofread your entry and click **Next** to complete your transaction.